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ABSTRACT

This report presents the goals and intentions of the National Association of Student Financial Aid Administrators (NASFAA) for the next 5 years. It describes the development of this plan, the place of NASFAA in environmental and historical contexts, and how the plan will be implemented and monitored. Goals for NASFAA activities include to: (1) educate legislators and administrators on the economic, social, and cultural benefits of higher education and the investment value of financial aid funding; (2) assume a leadership role in public policy issues; (3) maintain an active role in the review and development of effective need analysis systems and promote standardization of delivery systems; (4) review, develop, and enhance NASFAA professional development opportunities; (5) review, develop, and enhance NASFAA publications and methods of information dissemination; (6) coordinate program and activities with local associations; (7) assist institutions in evaluating alternative methods of managing financial aid; (8) serve as a national leader and clearinghouse for the collection of student aid data and assist institutions in developing baseline data for their internal use; (9) strengthen accountability and standards of performance; (10) coordinate training; (11) promote early awareness and planning; (12) raise public awareness of education; and (13) educate the public on the value of student aid as an investment. (JLS)

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ED 404 921

The Five Year Strategic Plan

1996—2001

HE029 926

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NASFAA

National Association of Student Financial Aid Administrators

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January 1997

Dear Colleagues:

We are happy to present NASFAA's Strategic Long Range Plan for the years 1996 to 2001. Since 1987, NASFAA has, through "strategic planning," attempted to best project its environment and the needs of its members as a basis for determining activities, projects and products each year. Under this system, the Association Governance Committee annually reviews and reports to the Board of Directors on the progress that the Board, committees, and staff have made in meeting the goals of the plan; and on the continued relevance of each goal and objective.

The basic materials used in the development of this strategic long range plan include the October 1995 Membership Services Survey, an environmental scan projecting five years hence, and the activities of 70 NASFAA members at the Strategic Long Range Planning Retreat, held in February 1996. Through the Survey and the Retreat, hundreds of NASFAA members have contributed to forecasting the Association's responsibilities into the new century.

This report offers for your review the goals and intentions of the Association for the next five years, and provides information on the development of this plan, the Association's place in environmental and historical context, and how the plan will be implemented and monitored.

We appreciate your contributions and support for the activities of the Association.

William A. Irwin
National Chair, 1995-96

A. Dallas Martin
President

Marvin G. Carmichael
National Chair, 1996-97

Goals of the National Association of Student Financial Aid Administrators

Activities

1. Educate Federal and state legislators and administrators on the economic, social and cultural benefits of higher education for the individual and the country, and on the investment value of financial aid funding.

2. Assume a leadership role in developing and responding to relevant public policy issues and in promoting appropriate public policy regarding student aid; publicize NASFAA's position on student aid issues to policy makers.

3. Maintain an active role in the review and development of effective financial aid need analysis systems, and promote standardization, consistency and simplicity in the student aid delivery system.

4. Review, develop and enhance all NASFAA professional development opportunities, taking into consideration the capabilities and needs of various constituents and the variety of available methods of delivery.

5. Review, develop, and enhance NASFAA publications and methods of information dissemination so that they are responsive to the diverse needs and capabilities of the membership.

6. Coordinate programs and activities among NASFAA and state and/or regional financial aid associations.

7. Assist institutions in evaluating alternative methods of managing financial aid operations, in responding to and utilizing new developments in telecommunications and other technologies, and in responding to trends in non-traditional education delivery.

8. Serve as a national leader and clearinghouse for the collection of student aid data, programs, and models, and assist institutions in developing similar baseline data for their internal use.

9. Strengthen financial aid administrator accountability and standards of performance.

10. Coordinate financial aid technical training for our colleagues within postsecondary institutions, and expand inter-associational networking opportunities.

11. Promote early awareness of and planning for postsecondary education to the public, optimizing communication with students.

12. Raise public awareness of education by pursuing collaborative opportunities with profit and not-for-profit entities.

13. Educate the public on the value of student aid as an investment.

Association Maintenance and Operations

1. MONITOR NASFAA's governance, structure and activities.

2. MAINTAIN the fiscal integrity of the Association.

Purposes of the National Association of Student Financial Aid Administrators

PROMOTE the professional preparation, effectiveness and association of administrators and counselors of student financial aid in institutions of postsecondary education, government agencies, foundations, and private and community organizations.

PROMOTE the professional preparation, effectiveness and association of others in institutions of postsecondary education, government agencies, foundations, and private and community organizations concerned with support and administration of student financial aid.

SERVE as a national forum and act as a focus for the expression of views on matters relating to the development, funding and conduct of student financial aid.

PROMOTE and encourage programs which provide for educational opportunity and full development of individual potential of students.

SERVE effectively the interests and needs of students, institutions, government agencies and sponsors through coordination of plans and programs pertinent to student financial aid.

ASSIST educational institutions, foundations, government agencies, and private community organizations to promote and develop effective programs of student financial aid.

FACILITATE communication between educational institutions and agencies and organizations which provide student aid funds.

PROMOTE such systematic studies, cooperative experiments, conferences and other related activities as may be desirable or necessary to fulfill the purposes of the corporation.

Values of the National Association of Student Financial Aid Administrators

NASFAA values: Students

This value encompasses a commitment to those we serve: the students — from pre-primary through postsecondary — and their families. We appreciate the rich diversity students bring to our institution. NASFAA encourages the academic success of students.

NASFAA values: Education

Education enriches our society and raises the standard of living for all citizens.

NASFAA values: Financial Aid

NASFAA is committed to access to higher education for all students. We believe that, to the extent possible, financial need should be used as the central concept in the developing and awarding of student aid program monies. NASFAA supports the removal of economic barriers to promote academic success. However, we recognize that some donors and institutions may wish to award some aid on the basis of criteria other than financial need.

NASFAA values: Diversity

NASFAA appreciates the contribution of each of its members and the various institutional types they represent. The pluralistic system of America's educational system is a factor that must be acknowledged. Similarly, NASFAA benefits both by its sectoral diversity and by the varied and rich diversity of its members.

NASFAA values: Integrity

Each NASFAA member should maintain the highest level of professionalism and ethics, reflecting a commitment to Association goals and vision.

History of Planning

Prior to 1986, the association's planning process consisted of an annual determination of goals and objectives by the National Chair in consultation with the President and the Board of Directors. Committee assignments flowed from these goals and objectives. The focus of activities could and often did vary from year to year. While this flexible approach lent itself to consideration of immediate and emerging issues, it provided little stability for association programs or finances. The challenges posed by NASFAA's emerging national prominence and by changing conditions for postsecondary institutions suggested a longer-term planning process. NASFAA's leaders required a set of procedures that would identify strengths and weaknesses, options for current activities, and opportunities for the future. Strategic planning would provide an overall framework within which the leadership would guide the association in its efforts to provide optimal services for the membership.

The first strategic long-range planning retreat took place in June 1986, and the first five-year plan was adopted by the Board of Directors in 1987. The Association Governance Committee developed a monitoring system for the plan, which was comprised of 12 broad goals and more than 140 objectives to achieve them. Under this system, which continues to the present, the Association Governance Committee reviews progress on the plan and the relevance of each goal and objective in the current environment. The committee presents a report annually to the Board of Directors, which may reevaluate priorities and redirect activities as circumstances change.

In 1990, the Association Governance Committee was directed to review and update the plan for the succeeding five years. The second strategic plan, developed via a membership services survey, focus groups, and planning meetings with the Board of Directors, was adopted in 1991.

Development of the Current Plan. As NASFAA approached the end of its second planning phase, the Board agreed on an approach to planning that would include extensive membership input. The approach, which the Association Governance Committee submitted to the Board in July 1995, included several steps: a membership services survey, an environmental scan, a planning retreat, and the writing and rewriting of the strategic plan. The planning process began in fall 1995 with distribution of the membership survey, followed by a four-day planning retreat in winter 1996, and adoption of the final plan by the Board of Directors in summer 1996. The Association Governance and Membership Committee* will continue to monitor progress on the plan and report annually to the Board of Directors.

*Renamed in 1996–97 to reflect responsibility for activities previously charged to the former Membership Services Committee.

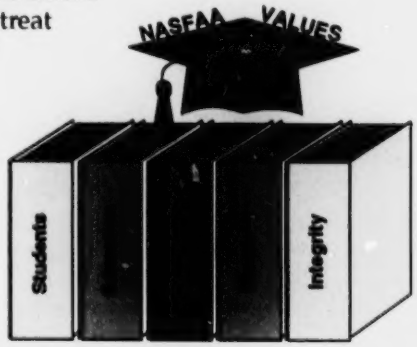
Planning for the Future

The National Association of Student Financial Aid Administrators believes that through strategic planning it is best able to make decisions about its future and provide an overall structure for Association activities and optimal services for the membership. Since the adoption of its first Strategic Long Range Plan in 1987, NASFAA has routinely managed its progress through this process, evaluating the impact of the external environment on the "internal" environment of the financial aid administrator, seeking input from the membership on the success of its projects and programs, and projecting external and internal needs five years hence.

This strategic plan, which is intended to provide the framework for Association activities into the year 2001, was developed over a course of months and involved the participation of literally hundreds of NASFAA members. The basic underpinnings of this plan were derived from the results of the Membership Services Survey distributed in October 1995 and a planning retreat held in February 1996.

The *Membership Services Survey*, with over 2,000 respondents, revealed that NASFAA members continue to believe that activities related to legislation, regulation, technical assistance, and advocacy are the most important services provided by the Association. Members also place a high priority on professional development and on the efficient dissemination of information. The importance of specific services and activities may be viewed differently by different members. It is important to provide a broad array of services to meet the needs of all members. NASFAA is the voice of the financial aid administrator in Washington, and its members expect that voice to appropriately represent their concerns and the importance attached to those concerns at their schools. They expect that same voice to give them the current facts and quality products they have grown to depend upon.

In selecting individuals to invite to the *Strategic Planning Retreat*, NASFAA Chairman William Irwin informally canvassed members of the Association to identify "people who you admire . . . people who you think can contribute to this activity." Retreat planners ensured that the group included the entire Board of Directors and reflected representation from all regions (and, to the extent possible, from each state) and institutional types. (A listing of Retreat Participants and Contributors is appended.)



During the Retreat, participants reviewed the results of the Membership Services Survey and a scan of the environment presented by President Martin as they related to the Purposes of the Association. After agreeing upon five focal points for NASFAA values, the group developed a series of "action items," or goals, along with recommended activities intended to assist the Association in fulfilling its objectives.

The Report on the Strategic Planning Process detailed the activities of the Retreat and the follow-up work of the Board and the Association Governance Committee. *The Five Year Strategic Plan 1996–2001*, adopted by the Board in July 1996, distills the input from these various sources into a workable plan intended to guide the Association's efforts over the next five years.

Meeting the Challenges of the Education Environment

The state of education in the United States has improved. In the twelve years since "A Nation At Risk" advocated tougher course requirements for high school graduation, states and students have responded dramatically. The National Center for Education Statistics reports that as of 1990, 42 of the 50 states had raised course requirements for high school graduation, and 47 had mandated student testing standards. From 1972 to 1993, the percentage of high school graduates enrolling in college by October following graduation increased from 50% to 62%, and rates of attainment in higher education for United States men and women today remain among the highest in the world.

Rapid technological advances over the past several years have put a premium on education and job skills, both for the individual and for the nation. In addition to a strong correlation between income and education, statistics show that most individuals with a higher education and sophisticated skills have benefitted economically more over the past two decades than have those without such knowledge and ability. While the nation's overall economy has grown over recent decades, the incomes of average Americans have remained stagnant or even declined.

Economic problems and perceptions certainly impact all of us, as well as our institutions and consumers. Annual rates of increases in tuition within all sectors have been higher than the rate of inflation. Despite this somewhat daunting picture, data show that even among low income families (who may be more affected by rising college tuition), college-going rates increased significantly from 33% in 1980 to 50% in 1993. The state of education today presents NASFAA with continuing and evolving challenges.

How can NASFAA help to preserve education as a priority, and to preserve future Federal financial aid expenditures?

Changing economic, social and political factors will greatly impact America's education system during the next decade. The overall economic condition of the Federal Government and its projected budgetary priorities are likely to have a significant impact upon future federal educational expenditures and upon NASFAA's future role and services.

The composition of postsecondary institution students is changing as well. Many more disabled students, particularly those with learning disabilities, are enrolling in postsecondary institutions. Many more students, particularly at the elementary/secondary level, speak a language other than English at home and have difficulty speaking, reading and writing English. Almost half of all 16- to 24-year-old full-time college students were employed in 1993, and about one-fourth worked at least 20 hours per week.

How can NASFAA help its members assist the education consumer?

Between 1984 and 1993, the percentage of students enrolled in grades 7–12 using computers nearly doubled, producing a more technologically adept college-going population. These trends and characteristics are by no means a complete description of the education consumer who will enroll in NASFAA member institutions in the years ahead. The facts, however, compel us to consider some of the challenges that lie ahead.

Meeting the Needs of the Membership

As an institutional membership association, NASFAA must be aware of current trends and assist its members in addressing them. Association activities must be guided by member opinions and their unique needs. The responsibilities of financial aid offices have changed dramatically over the past decade. Financial aid administrators are struggling to remain abreast of technological advances in environments where funds for training and equipment upgrades are often limited. A financial aid administrator is called upon to wear many hats, and is required to develop diverse skills. Aid administrators look to NASFAA to assist them with their tasks and to provide them with the information, materials, and techniques to perform their jobs well. They also look forward to meetings and seminars that not only assist them in their professional development, but provide an opportunity to discuss matters of mutual concern with their colleagues.

NASFAA is a unique organization that has grown from modest beginnings 30 years ago into a highly successful, fully functioning professional association. NASFAA now has more postsecondary educational institution members within its membership ranks than any other association in Washington, D.C. The Association recognizes that the strength of any organization is its people, and NASFAA has always relied upon extensive participation by a broadly representative but ever-changing group of enthusiastic member-volunteers. The structure of State, Regional, and National Associations provides linkages that facilitate communication and afford leadership advancement opportunities to members.

How can NASFAA best serve the professional development and technical needs of its members?

Fulfilling the Promise of the Future

Since the adoption of its first Strategic Long Range Plan in 1987, NASFAA's Association Governance Committee has monitored the implementation of each five-year plan. Under this system, the Association Governance Committee annually reviews and reports to the Board of Directors on the progress that the Board, committees, and staff have made in meeting the goals of the plan, and on the continued relevance of each goal and objective. The strategic plan presented in the following pages outlines the recommended activities of the Association to fulfill its thirteen identified activity goals in the next five years. Following assignments to relevant committees for each activity, the Association Governance Committee will monitor annually the progress made toward achieving these stated goals and report to the membership on the outcomes. The Association Governance Committee additionally bears responsibility for ensuring the Association meets the stated maintenance and operations goals.

The Plan: Association Activities

Goal 1

Educate Federal and state legislators and administrators on the economic, social and cultural benefits of higher education for the individual and the country, and on the investment value of financial aid funding.

A. Collect and maintain data on employment rates, income and taxes paid, crime and prison rates, and medical costs by educational attainment; and compile and analyze statistical data on the impact of financial aid programs.

B. Communicate data directly to Congress and the White House and make this information available to states and regions for use at the local level.

C. Promote NASFAA's unique expertise by offering technical assistance to legislative groups, maintaining key legislative and executive branch contacts, and providing informational mailings to these entities.

D. Develop and implement a media relations program on the benefits of higher education and student financial aid.

Goal 2

Assume a leadership role in developing and responding to relevant public policy issues and in promoting appropriate public policy regarding student aid; publicize NASFAA's position on student aid issues to policy makers.

A. Develop and disseminate a periodic environmental scan.

B. Establish and define the Association's positions on public policy issues, using input from the membership (via periodic membership surveys).

C. Coordinate the responses of NASFAA and other postsecondary educational organizations; develop model response letters for pending legislation and regulations; develop resource material (glossary of terms, primer on the process, etc.); and offer strategies for effective visits with state and Federal legislative staff.

D. Prepare and coordinate recommendations for the Reauthorization of the Higher Education Act.

E. Update and distribute NASFAA's Congressional Resource Guide to Congress and the membership.

F. Provide education and training for student leaders about financial aid issues.

G. Work with members to identify and prepare students for participation in active discussions with Congress and the Department of Education.

Goal 3

Maintain an active role in the review and development of effective financial aid need analysis systems, and promote standardization, consistency and simplicity in the student aid delivery system.

A. Evaluate current need analysis theory utilizing the expertise of economists and recommend changes in need analysis processes to policy makers to effect the more equitable distribution of aid to students.

B. Advocate continuing research and the development of databases to test the relative impact of proposed changes, especially with regard to Reauthorization issues.

C. Disseminate information and provide training to the membership regarding need analysis principles and the results of changes to the formulas.

D. Evaluate the current delivery system and make recommendations on needed improvements or changes.

Goal 4

Review, develop, and enhance all NASFAA professional development opportunities, taking into consideration the capabilities and needs of various constituents and the variety of available methods of delivery.

A. Offer timely, affordable, and readily accessible training.

B. Determine strategies to prepare members to serve the needs of their students (*e.g.*, financial planning, payment plans, early awareness, debt management, student leader training; and in assisting special populations such as learning disabled and non-English-speaking students).

C. Determine strategies to prepare members to address professional issues (*e.g.*, legal issues, management skills, reporting and communication skills, leadership development, legislative advocacy, technical matters, retention, enrollment management, economic and social trends).

D. Identify ways to educate members on political advocacy, such as providing a "teacher's guide" that can be used in regions and/or states.

E. Develop and implement innovative training opportunities and methods for both centralized and decentralized training; and consider the merits of engaging professional trainers in addition to member volunteers.

F. Explore offering decentralized and legislative advocacy training as part of the Leadership Conference.

Goal 5

Review, develop, and enhance NASFAA publications and methods of information dissemination so that they are responsive to the diverse needs and capabilities of the membership.

A. Assess current and future membership information needs based on periodic membership surveys and other methods.

B. Explore and adopt a variety of methods of information dissemination.

C. Provide Federal Monitor "Cliff's Notes" electronically and/or in paper copy.

Goal 6

Coordinate programs and activities among NASFAA and state and/or regional financial aid associations.

A. Explore opportunities for expanding and enhancing the benefits of the Leadership Conference.

B. Organize and offer NASFAA programs or sessions for state and regional conferences.

C. Review the structure and emphasis of the National Conference taking into consideration different components, such as highlighting state/regional programs.

D. Develop workshops on the operational aspects of Association functions (newsletter, finance, meeting management, etc.).

E. Develop a suggested format or template for associations' World Wide Web pages and offer technical assistance with implementation.

Goal 7

Assist institutions in evaluating alternative methods of managing financial aid operations, in responding to and utilizing new developments in telecommunications and other technologies, and in responding to trends in non-traditional education delivery.

A. Identify institutional services and information most appropriate for delivery via electronic media such as the World Wide Web.

B. Identify providers who offer technological services.

C. Encourage the U.S. Department of Education to develop more effective electronic initiatives.

D. Identify possible linkages with other technologies such as the Department of Education's Project EASI, National Student Loan Data System, Integrated Student Aid Management System, etc.

E. Research and encourage the implementation of new technology in the delivery of services to students, institutions and other organizations (*e.g.*, Smart Card); facilitate access to information by providing linkages between various sources.

F. Identify and forecast changes impacting the financial aid environment, such as enrollment management, financial aid leveraging, re-engineering, outsourcing, and trends in non-traditional education (NTE).

G. Develop a tool to assist institutions in evaluating the need for alternative management services and the organizations that provide them.

H. Develop a tool that identifies key financial aid management issues that must be addressed when considering re-engineering, enrollment management, etc.

I. Develop NTE guidelines, and models for consortia, study abroad agreements, and electronic delivery systems.

J. Work with institutions to develop experimental site proposals that deal with NTE.

K. Coordinate with other higher education associations to bring attention to these issues.

Goal 8

Serve as a national leader and clearinghouse for the collection of student aid data, programs, and models, and assist institutions in developing similar baseline data for their internal use.

A. Coordinate uniform data collection efforts using a defined, common set of data elements and provide training for collection, analysis, and interpretation of data.

B. Serve as a repository of information and data sources: data sets, projects, programs, models, research, and reports.

C. Implement a document tracking plan to manage and archive government documents, NASFAA records, and other related material.

D. Disseminate data and information using advanced technology.

E. Develop models and suggestions for using the data (*e.g.*, creating data sheets that schools could provide to legislators; instructions for use in annual reporting, responding to NPRMs, evaluating the impact of proposed legislation, responding to surveys, and assisting in the identification of institutional needs).

F. Develop an interactive software program (similar to the NASFAA Staffing Model) that will calculate the return on financial aid investment as it impacts institutions and the Federal government's revenue base.

Goal 9

Strengthen financial aid administrator accountability and standards of performance.

A. Review and update the Statement of Good Practices.

B. Evaluate the desirability of establishing a NASFAA peer review program.

C. Provide enhanced tools for self-assessment.

D. Evaluate the possibilities for endorsing/awarding Continuing Education Units.

E. Review the merits of financial aid administrator certification standards.

Goal 10

Coordinate financial aid technical training for our colleagues within postsecondary institutions, and expand inter-associational networking opportunities.

A. Through periodic need assessments, cooperatively define postsecondary institutions' training needs with other higher education associations.

B. Facilitate idea exchange on issues of mutual concern (*e.g.*, enrollment management, direct lending, electronic transcript).

C. Determine the impact of technology on inter-associational networking, and identify ways to provide peer networking opportunities.

D. Develop annual financial aid interest sessions to be offered at conferences and workshops of higher education organizations, and offer the same opportunity for these groups at the NASFAA Conference.

E. Prepare training materials and disseminate and/or conduct training seminars, conferences, and tapes/video conferences.

F. Compile and maintain a comprehensive annual meeting and activities calendar.

G. Promote relevant training opportunities provided by and offered for other organizations.

H. Collaborate on the delivery of training.

Goal 11

Promote early awareness of and planning for postsecondary education to the public, optimizing communication with students.

A. Evaluate current NASFAA programs such as the Carnival of Learning, continue those deemed most effective, and identify other possible programs and models (*e.g.*, Adopt-A-School programs).

B. Educate the membership about NASFAA early awareness activities, provide training in developing such programs locally, and provide assistance in promoting these activities.

C. Develop and disseminate financial planning materials independently or in cooperation with others.

D. Evaluate current student aid consumer information and assess its effectiveness; identify deficiencies and assist in the development of suitable materials.

E. Develop or support a national scholarship database at little or no cost to students, and promote its availability.

F. Provide guidance to members and consumers on how to evaluate relevant commercial services.

Goal 12

Raise public awareness of education by pursuing collaborative opportunities with profit and not-for-profit entities.

A. Explore and evaluate model programs that provide financial support for students and advance career goals.

B. Work with business partners to expand school-to-work program models and share this information with members.

C. Coordinate the dissemination of information on financial aid regulations, practices, and funding of current programs to entities providing funds to increase understanding and maximize benefits of existing funding.

D. Offer opportunities for states and other entities to work together to develop guidelines for new educational funding sources.

Goal 13

Educate the public on the value of student aid as an investment.

A. Identify values of student aid that can be communicated in 30-second publicity announcements.

B. Solicit support from sponsors to purchase air time or assist with Public Service Announcement (PSA) development costs.

C. Solicit support from intercollegiate athletics associations or others to allow NASFAA's PSAs to air during broadcast events.

D. Identify a sponsor for legislation to establish a Financial Aid Awareness Month, and coordinate support from the membership to Congress.

E. Develop a media relations campaign to promote Financial Aid Awareness Month.

The Plan: Association Maintenance and Operations

Goal 1

Monitor NASFAA's governance, structure and activities.

A. Ensure effective leadership and equitable representation of NASFAA's members.

B. Review the Articles of Incorporation and the Bylaws of the Association as needed and recommend appropriate changes.

C. Review and evaluate the strategic long-range plan, make recommendations to the Board of Directors on the progress made in meeting the goals and on updates and changes necessary to meet the current needs of the Association and preserve the intent of the planners.

Goal 2

Maintain the fiscal integrity of the Association.

A. Annually update the five-year financial forecast.

B. Maintain optimal investment strategies through the use of financial specialists.

C. Review and monitor all revenue sources to maintain an appropriate balance between revenue and expenses for a non-profit association.

Appendix: Retreat Participants and Contributors

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